8.07. Stock control methods for your customers (requisitions)

Stock supply philosophy

mSupply is designed for situations such as a central supply facility within a country or region, or within a hospital where the supply of stock to customers is controlled by the supplying facility. That is, supply of stock to customers is managed by the supplying store.

Regardless of who controls the supply of stock, it needs to be made principally on the basis of information about the customer's anticipated usage. mSupply has several ways of arriving at quantities to be supplied to customers:

- Responding directly to paper-based customer orders/requisitions
- The stock history method
- The imprest method
- Response requisitions
 - Full Entry of Request & Requisition Forms by the Supplying Facility
 - $\,\circ\,$ (This was developed for Côte d'Ivoire but can be activated for any country on request)

Collectively, these are grouped together as different types of **requisition**. When editing an item, you can view all types of requisition records for that item. More information is available on the requisitions page (if you can think of better names, please tell us!).

Please note that it is possible for all of these to be done by programme if required - see the 4.05. Programs page for details.

Defining the list of items to be included in the re-supply

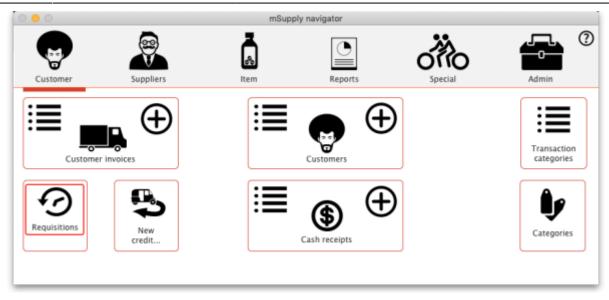
The lists of items that a customer can receive can be dfined by master lists.

See the 4.04. Item master lists page for information on managing master lists and see the Assigning a list to a customer section for how to assign a master list to a customer.

Viewing existing requisitions

Choose *Customer* > *Show requisitions...* from the menus or click on the Requisitions icon on the Customers tab of the Navigator:

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This window will open, showing you a list of the requisitions already in the system:

Ner	w customer equisition	New customer imprest	New cu stock	stomer history	Delete			Show: All
ID	Name			Date entered	Requisition date	Status	Туре	Comment

- **ID:** Unique identifier of the requisition.
- Name: The name of the customer the requisition has been entered for.
- **Date entered:** The date the requisition was first saved in mSupply.
- **Requisition date:** The date the requisition as given by the customer.
- **Status:** The status of the requisition (*sg*, *cn*, or *fn* nomally, web requisitions can also be *wf* or *wp*).
- **Type:** The type of requisition; *sh* for customer stock history, *im* for imprest or *response* for a response requisition.
- **Comment:** The comment entered on the requisition.

Use the **Show** drop down list to filter the requisitions by status.

After filtering this way, if the list is too long to find a particular requisition you are interested in then

you can type something in the **Search** field. If you type anything in the **Search** field, only requisitions with a customer name, requisition number, program or comment that contain what you typed will be displayed.

To edit a particular requisition, double-click on it in the list. A window will open, populated with the requisition's details; the window will be different depending on the type of requisition (see sections below).

To create a new requisition of a particular type (see below), click on the appropriate 📩 button - a new, blank window will open ready for you to enter the requisition.

To delete a requisition, click on it in the list to select it then click on the **Delete** button. You will be asked to confirm the deletion before it is carried out. **Please note:** You cannot delete a requisition if a customer invoice has been created from it - mSupply will tell you if this is the case. You can still delete the requisition but you must delete the customer invoice first.

Stock history method

The theory behind the stock history method (sometimes referred to as the Historical Logistics Method) is based on the assumption that future customer usage will be similar to historic usage.

We can calculate the customer's average usage over time if we know their stock levels at two points in time, and what stock they received from us in that intervening period. We assume that this average usage rate will continue over the coming supply period.

There are three more variables that need to be estimated:

- The number of months in the coming supply period
- The lead time required to supply them (that is, the time lag between the customer doing a stocktake in order to trigger re-supply, and receipt of the stock)
- The number of month's worth of buffer stock they need

With this data, the calculation is like this:

- A = Stock on hand on date1
- B = Amount supplied to customer between date1 and date2
- C = Stock on hand on date2
- D = Quantity used in period between date1 and date2 = A+B-C
- E = number of months between date1 and date2
- F = Usage rate = D/E
- G = Number of months in coming supply period
- H = Number of buffer stock months desired
- I = Lead time (months) between date2 and delivery of stock
- $J = Amount to supply = F^*(G+H+I)-C$

Using the stock history method:

- A and C are reported by the customer on date1 and date2 respectively
- B is calculated by mSupply based on mSupply records
- G, H and I are entered by the user

• D, E, F and J are calculated by mSupply

mSupply uses stock issued by the supplying store to arrive at the parameter B.

Obviously, if the customer has received goods from other sources during the calculation period, B will be inaccurate!

First stocktake record

In order to calculate the usage rate, mSupply requires stock on hand figures of the items on the list recorded on an earlier date (date1) = A, above. This becomes the *initial stock history record*.

To create such a record, follow the procedure described below for entering a stock history, noting particularly, the following:

- 1. Enter the date as the correct date at the time the stocktake was performed.
- 2. Ignore the figures that automatically appear along each row, except for the *Their current stock* column.
- 3. Enter their current stock figures in the *Their current stock* column
- 4. Close the window using the OK button.

Regular use

Once your customer's first stocktake record has been entered, and a period of time has passed with some customer stock usage, re-supply can be be generated on the basis of this usage.

A re-supply using the stock history method needs to be triggered by a customer stocktake. If your customer is set up with mSupply customer web interface, then this process can be initiated by the customer directly, and then completed in the supplying store as described below.

If your customer has not used the mSupply customer web interface to report their stocktake, then their stock data needs to be entered in manually to the supplying store.

Manual entry of customer stock history

To begin the process, choose *Customer* > *Show requisitions*, and the list of any historic customer stock histories is displayed along with the other requisition types. The *Status* column lets you know the status: sg (suggested) or cn (confirmed). The *Type* column shows the stocktake type: im (Imprest), sh (Stock History) or response (Requisition):

New customer requisition New customer imprest Stock history		Delete	Finalise		Show: Past 30 days
ID Name	Date entered	Requisition date	Status	Туре	Comment
4 Bike Hospital	30/07/2024	30/07/2024	sg	sh	
2 Amnesty Hospital	30/07/2024		-	im	
1 Cactus hospital	30/07/2024	30/07/2024	sg	response	

Double-clicking on a line will allow you to edit the selected record (provided that you have permission to do so).

With the passage of time, entries on the list will rapidly grow in number, and so mSupply allows you to apply a filter selecting exactly what will be displayed. The default display is for *Suggested*, as these are most likely the ones you will be processing; other options include *All*, *Confirmed*, *Web entries to be processed* - this covers histories submitted via the web customer interface - and *Entered today*

Add new customer stock history

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Click the **New customer stock history** button, to display the *Enter new customer stock history...* window:

Days	Name take date 26/08/13 to supply 0 r Received 26/08/13 Delete line(s)	Create Customer	Days between st Previous stock t Invoice Ri					Blac Blac	Entry date : Status : Stock Type : Entered by :	nw sh
Lin Item code	tem Name	Unit Our	OH Their Old S.	They recei	Their curren	Their usage	Their daily	Suggested quan		Actual quan
<										Þ
≟ ∔	Confirm							Cancel	OK & Next	ОК

Enter the first few letters of customer's name in the *Name* field, then press the *Tab* key to call up the list of customers' names from which the required customer may be chosen. In this example, our customer is Medical Ward.

Once you have chosen a customer, the window is populated with the items that are members of any item lists that:

- Have been assigned to that customer (both master lists and local lists)
- and that have the "Stock history" check box checked for that list

You are presented with this window:

2		Name Medical Ward		W03	2					Black	ID :	1172
_	Stock	take date 30/08/13		Day	s between stor	cktakes 4					Entry date :	30/08/13
	Days	to supply 30		Pre	vious stock tai	ke date 26/	08/13				Status :	sg
	Order	Received 30/08/13									Stock Type :	sh
C							1				Entered by :	Sussol
Ľ	•			A 10.						—		
)				Store:	General
Nev	line	Delete line(s) C	reate Cu	stomer Invo	ice Rev	ert to sugge	sted quan			Print	Store:	General
	line Item code	Delete line(s) Co	reate Cu Unit					Their usage	Their daily		Store:	General Actual quan
.in	ltem code							Their usage 20	Their daily 5	Print	Store:	Actual quan
.in	Item code	Item Name	Unit	Our SOH		They recei	Their curren 0	Their usage 20 4	Their daily 5 1	Print Suggested quan	Store:	Actual quan
Lin 1 2	Item code CAFdr CAFoint	Item Name Chloramphenicol 0.5% eye drop	Unit each	Our SOH 4923		They recei	Their curren 0	Their usage 20 4 18	Their daily 5 1 4.5	Print Suggested quan 150	Store:	Actual quan 150

Fill in customer stock history

The **Our SOH** column is the stock on hand in our own store, while figures in all subsequent columns are the customer's data.

The first entry to be made is in the Days to supply field, where the appropriate figure should be

entered - e.g. 30 if the ordering frequency is monthly, 90 if it is quarterly, etc.

You will see in our example that

- 29 days have passed since the last stocktake
- The column headed Their old SOH shows their stock on hand at the last stocktake
- The column headed *They received* shows the amounts supplied when their last order was processed
- The column headed *Their current SOH* is the column where the customer's current stock figures (as provided by the customer) are entered. But note that, just as with the imprest method, if the name you entered in the Name textbox is actually another store then this column will be automatically filled in with the current stock in the store saving you a lot of time (you only need to edit those figures where the stock in mSupply does not actually match what's on the store's shelves).
- As figures are entered, mSupply® calculates a suggested quantity to order, and this appears in the *Suggested quan* column. These suggested quantities should be reviewed, and any adjustment entered in the *Actual quan* column to reflect, for example, pack sizes and to ensure that actual quantities match exact multiples of the pack size.

After entries have been made in the column *Their current SOH* the window will look like this:

2		Name Medical Ward		W03	2					Black	ID: 1169
	Stock	take date 24/09/13		Day	s between sto	cktakes 29				_	Entry date : 24/09/13
	Days	to supply 30		Pre	vious stock ta	ke date 26/	08/13				Status : sg
	Order	Received 24/09/13									Stock Type : sh
											Entered by : Sussol
Ŀ	•	_		- T -		5					Store: General
Nev	/ line	Delete line(s) Cr	eate Cu	ustomer Invo	ice Rev	ert to sugge	sted quan			Print	
lin											
	Item code	Item Name	Unit	Our SOH	Their Old S	They recei	Their curren	Their usage	Their daily	Suggested quan	Actual guan
	CAFdr	Item Name Chloramphenicol 0.5% eye drop	Unit each	Our SOH 4923	Their Old S 5	They recei 15	Their curren 2	Their usage 18	Their daily 0.62	Suggested quan 17	Actual quan 17
1					Their Old S 5 4		Their curren 2 4	Their usage 18 0	-		
1	CAFdr	Chloramphenicol 0.5% eye drop	each	4923	Their Old S 5 4 6	15	Their curren 2 4 1	Their usage 18 0 17	0.62		17
1 2 3	CAFdr CAFoint	Chloramphenicol 0.5% eye drop Chloramphenicol 1% eye oint	each each	4923 73	Their Old 5	15	2 4 1	Their usage 18 0 17 12	0.62	17	17 0
1 2 3 4	CAFdr CAFoint Salinh	Chloramphenicol 0.5% eye drop Chloramphenicol 1% eye oint Salbutamol 100mcg/puff aerosol	each each each	4923 73 3198	Their Old 5 5 4 6 3 11	15 0 12	2 4 1	18 0 17	0.62 0 0.59	17	17 0 17
1 2 3 4 5	CAFdr CAFoint Salinh Salneb5	Chloramphenicol 0.5% eye drop Chloramphenicol 1% eye oint Salbutamol 100mcg/puff aerosol Salbutamol 5mg neb (neb vial)	each each each each each	4923 73 3198 31225	5 4 6 3	15 0 12 12	2 4 1	18 0 17 12	0.62 0 0.59 0.41	17 0 17 9	17 0 17 9
1 2 3 4 5	CAFdr CAFoint Salinh Salneb5 Haemoint	Chloramphenicol 0.5% eye drop Chloramphenicol 1% eye oint Salbutamol 100mcg/puff aerosol Salbutamol 5mg neb (neb vial) Antihaemorrhoid 30g oint	each each each each each	4923 73 3198 31225 1017	5 4 6 3	15 0 12 12 20	2 4 1	18 0 17 12 24	0.62 0 0.59 0.41 0.83	17 0 17 9	17 0 17 9
1 2 3 4 5 6 7	CAFdr CAFoint Salinh Salneb5 Haemoint Clopes	Chloramphenicol 0.5% eye drop Chloramphenicol 1% eye oint Salbutamol 100mcg/puff aerosol Salbutamol 5mg neb (neb vial) Antihaemorrhoid 30g oint Clotrimazole 100mg pessary (6 tab:	each each each each each each	4923 73 3198 31225 1017 11871	5 4 6 3	15 0 12 12 20 10	2 4 1	18 0 17 12 24 10	0.62 0 0.59 0.41 0.83 0.34	17 0 17 9 18 6	17 0 17 9 18 6
1 2 3 4 5 6 7 8	CAFdr CAFoint Salinh Salneb5 Haemoint Clopes Glycsup	Chloramphenicol 0.5% eye drop Chloramphenicol 1% eye oint Salbutamol 100mcg/puff aerosol Salbutamol 5mg neb (neb viai) Antihaemorrhoid 30g oint Clotrimazole 100mg pessary (6 tab: Glycerol 2.8g suppos Paracetamol 250mg suppos	each each each each each each each each	4923 73 3198 31225 1017 11871 556	5 4 6 3	15 0 12 12 20 10 12	2 4 1 3 7 4 2	18 0 17 12 24 10 14	0.62 0 0.59 0.41 0.83 0.34 0.48	17 0 17 9 18 6 12	17 0 17 9 18 6 12

All that remains is to make adjustments in the *Actual quantities* column, to reflect appropriate pack sizes.

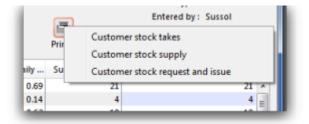
16	Cpzinj	Chlorpromazine S	50m			
17	Dex4	Dexamethasone 4	łmg			
18 DicA		Diclofenac 25mg/3m				
•						
		Confirm				
Save	Sort Order					

Once you are satisfied, the Confirm box (bottom left corner) should be checked, the Create customer

invoice button should be clicked, and you will proceed to creating the customer invoice, which is the same for all requisition types.

Printing forms

Clicking the **Print** button provides several options for printing forms:



- 1. **Customer stock takes:** This form you can give to the customer (for example, if they are a ward in a hospital that has mSupply running in it's pharmacy store), and they can fill out the quantities they have on hand, and then values are entered into mSupply.
- 2. **Customer stock supply:** This form provides information to give to the customer about the quantity they will be supplied.
- 3. **Customer stock request and issue:** This form provides information for the customer comparing what was requested with what was actually supplied.

The second two reports are for use after you have entered quantities to be supplied into the customer stock history window.

Imprest method

The Imprest method is probably the most commonly understood and used method of stock control, and has been used for many years, probably since before the invention of the computer!

As can be seen by the discussion below, the Imprest method is a simplification of the Stock History method discussed above. We argue that the Stock History method is superior to the Imprest method because it dynamically calculates a number of values based on live customer consumption data, rather than relying on some historic calculation that is likely out of date. It is quite understandable why the Imprest method is the standard approach in hospitals - because it was developed before the computer age, and its hard to change old habits. However, now that you have mSupply ready to do the number crunching, we suggest that you seriously consider using the Stock History

method instead of the Imprest method...



With the Imprest method, the quantity to be ordered is the quantity necessary to restore the stock on hand to a pre-agreed fixed quantity. This imprest stocktake must be carried out on a regular fixed

frequency (daily, weekly, fortnightly, monthly, whatever.) This pre-agreed fixed quantity is arrived at on the basis of a number of simplifications to the stock history method:

- A = Stock on hand on date1
- B = Amount supplied to customer between date1 and date2
- C = Stock on hand on date2 THE ONLY INFORMATION COLLECTED
- D = Quantity used in period between date1 and date2.
- E = number of days between date1 and date2
- F = Usage rate **PRE-DETERMINED AND FIXED**
- G = Number of days in coming supply period **PRE-DETERMINED AND FIXED**
- H = Number of buffer stock days desired **PRE-DETERMINED AND FIXED**
- I = Lead time (days) between date2 and delivery of stock = 0

The Imprest Quantity = F*(G+H+I)

• J = Amount to supply = Imprest Quantity -C

If stocktakes are not taken at the pre-determined frequency, and particularly if they are missed, the system will fail. It is a fairly rigid system, in that once set, F, G and H must remain constant. It is frequently used for supplying wards in a hospital setting, where operations are generally more controllable.

Using the imprest system

The *imprest system* operates in this way:

- The stock of a particular item which a customer (usually a clinic, ward or department) should hold is agreed. This is the **Imprest quantity**.
- A stocktake is carried out at the facility, giving us a **Stock on hand**.
- The amount to be ordered by the facility is calculated as:

Order quantity = Imprest quantity - Stock on hand

For example, take the case of a rural clinic which receives a monthly order from a central store:

- It is agreed that the clinic, when fully stocked, should hold 10,000 paracetamol 500mg tablets. This is the **Imprest quantity**.
- At the end of a particular month, a stocktake shows that the **Stock on hand** is 2,400 paracetamol tablets.
- To restore the stock of paracetamol tablets to the Imprest quantity, the amount to be ordered is calculated as:

Order quantity = 10,000 (**Imprest quantity**) minus 2,400 (**Stock on hand**) = 7,600

This feature caters for mSupply users who operate an imprest system, where a central store supplies goods on a *regular basis* to a number of customers, who may/may not be mSupply users themselves. We advise that the customers should be provided with a list - perhaps for a 12 month period - of the dates on which they should perform a stock check and submit the figures, ideally on a customised form, to the central store acccording to the prearranged schedule. It is important to note that the customer needs to supply only the current stock on hand figures, a relatively simple task; customers are not required to submit details of what they perceive to be order quantities.

It should be remembered that the items to be included in the list and their imprest quantities must be defined for each customer individually. The imprest quantity defined for a particular customer is unique to that customer, and has no bearing on imprest quantities defined for other customers.

Processing the order from the customer

The central store, on receiving the stock on hand details from the customer, selects from the Navigator or Customer menu the item *Show requisitions*, which displays this window:

New customer requisition imprest stock history		Delete	Finalise		Show: Past 30 days
ID Name	Date entered	Requisition date	Status	Туре	Comment
4 Bike Hospital	30/07/2024	30/07/2024	59	sh	
2 Amnesty Hospital	30/07/2024	30/07/2024	sg	im	
1 Cactus hospital	30/07/2024	30/07/2024	sg	response	

If you are working with a customer for whom no imprest list has been defined, clicking on the *New customer imprest* will display the *Enter new imprest* window, where appropriate entries are made.

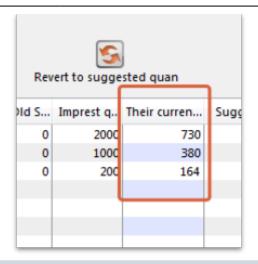
2025/06/27 22:33	11/23	8.07. Stock control methods for your customers (requisitions)

Letter new impres								x
	Name e date 26/08/13					B	ack ID : Entry date :	1158 26/08/13
							Status :	
Order Re	ceived 26/08/13						Stock Type :	
•		-	5]			Entered by :	General
New line	Delete line(s)	Create Customer In		sted quan		Print	Store	General
Lin Item code	Item Name	Unit Our SO	H Their Old S Imprest q	Their curren	Suggested quan			Actual guan
								*
								-
4								F.
Save Sort Order	Confirm					Cancel	OK & Next	OK
								.:1

Continuing to use Highland Health Centre as our example (for whom we have created an imprest list), double clicking on that entry displays this new window on which the imprest list appears:

2	Order	Name Highland Health Ce take date 26/08/13 Received 26/08/13		нса		2			-	Entry date : Status : Stock Type : Entered by :	sg im
New		Delete line(s)		stomer Invo		ert to sugge			Print		
	Item code		Unit					Suggested quan			Actual quan
	Ibu2	Ibuprofen 200mg tab	each	2336	0	2000	0	2000			2000
	Pred5 Hal5	Prednisolone 5mg tab Haloperidol 5mg tab	each each	540 21396	0	1000 200	o ol	1000 36			1000 200
	Sort Order	Confirm							Cancel	OK & Next	Þ OK

You will note that there are no entries in the *Their current stock* column, and the figures supplied by the customer should be entered; click on each line, and after a second or two the zero appearing in that column can be edited with the required figures.

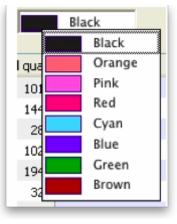


There is an important exception here: if the name you entered in the Name textbox is actually another store in mSupply then the *Their current stock* column will be automatically filled in with the stock in the store. Very useful time saving feature!

Simultaneously, mSupply completes the next two columns, *Suggested Quantity*, and *Actual Quantity*. The *Actual Quantity* entries may be edited to reflect, for example, pack sizes, to ensure that actual quantities match exact multiples of the pack size. After editing, the window may appear like this:

2	Stock	Name Highland Health Ce take date 26/08/13	ntre	HC4	ł			BI	ack ID: 1153 Entry date: 26/08/13
	Order	Received 26/08/13	Create Cu	stomer Invo	ice Rev	st to suggested qu	Jan	Print	Status : sg Stock Type : im Entered by : Sussol Store: General
Lin	Item code	Item Name	Unit	Our SOH	Their Old S	Imprest quantity	Their current SOH	Suggested quan	Actual guan
1	Ibu2	Ibuprofen 200mg tab	each	2336	0	2000	730	1270	1500
2	Pred5	Prednisolone 5mg tab	each	540	0	1000	380	620	1000
3	Hal5	Haloperidol 5mg tab	each	21396	0	200	164	36	100

Should you have any reason to identify one or more lines, this may be performed by highlighting the line(s), and changing the colour of the font. Black is the default, but other options may be selected from the drop-down list:



Selecting 5 or more lines brings up an alert requiring confirmation of your intention.

Once you are satisfied, the *Create customer invoice* button should be clicked, and you will proceed to creating the customer invoice, which is the same for all requisition types.

Response (internal) requisitions

These work in much the same way as customer stock histories, but with some notable differences:

- Most importantly, you don't need to create it! A response requisition will be automatically created in your (supplying) store as a result of a request requisition from an mSupply mobile (see here for details) or an internal order from another store (e.g. on another mSupply 'desktop' site). In both of these cases, the customer is another store in your mSupply system and most of the data will have been entered already by them. You can create one manually if you need to though, as we'll describe below.
- It doesn't attempt to calculate usage or suggest an amount to supply this data is expected to have come from the customer.
- It is possible to generate multiple customer invoices from a single response requisition e.g. if not all of the requested stock is available at the time the requisition is entered, this allows for an initial customer invoice to be sent to partially fulfil the request and another to be sent at a later date when more stock becomes available.
- It provides a more accurate way to track demand vs supply.

Entering a requisition

To begin the process, choose *Customer > Show requisitions*, and the list of any historic response requisitions is displayed along with the other requisition types. A *Status* of sg (suggested) means that no customer invoices have been created yet - as soon as the first customer invoice is created, the status will go to cn (confirmed):

Last update: 2022/09/05 issuing_goods:stock_control_methods https://docs.msupply.org.nz/issuing_goods:stock_control_methods?rev=1662386422 14:00

New customer requisition New customer imprest Stock history		Delete	Finalise		Show: Past 30 days
ID Name	Date entered	Requisition date	Status	Туре	Comment
4 Bike Hospital	30/07/2024		sg	sh	
2 Amnesty Hospital	30/07/2024		sg	im	
1 Cactus hospital	30/07/2024	30/07/2024	sg	response	

Either double-click on an existing requisition to edit it, or click the **New customer requisition** button to create a new one. The example below is for a manually entered requisition:

	•	ate 05/09/2022 Order Received Required date Add from master list Delete line(s)		2022	Ma	Comment Max MOS 1.0 by item name or code		S E		ategory Please select	Entry date		response 05/09/2022
				Data	entry Invo	vices created	Log	Reference doc	iments				
	Item code	item name	Unit	Our stock on hand	Customer current stock on hand	Customer requested	Already issued	Remaining to supply	Supply this invoice		Comment		
1	030453	Amoxicillin 250mg tabs	Tab	2257600	265	200	0	200	200				
2	038423	Salbutamol scored 2mg tabs	Tab	17000	469	300	0	300	300				
3	042744	Diazepam Injection 5mg/ml Amp/2ml	Aule	1450	5	30	0	30	30				
4	850804	Oral Rehydration 5r 1 litre/ CAR-100	Sachet	15000	79	100	0	100	100				
5	030062	Acetylsalicylic Acid 300mg tabs	Tablet	5000	761	400	0	400	400				
6	201116	Bandage W.O.W. 15cm wide x 5m roll	Roll	4332	184	200	0	200	200				
7	031661	Captopril scored 25mg tabs	Tablet	47500	77	200	0	200	200				
8	037020	Paracetamol 500mg tabs	Tablet	81000	980	500	0	500	500				
	Sort order												

If this is a manually entered requisition:

- Enter/update the customer *Name* in the same way as a customer stock history (i.e. enter the first key characters and hit the **Tab** key to find matches), but note that changing the customer will invalidate any other data that you've already entered.
- If necessary, update the *Requisition date*, *Order received* and *Required date* these will default to the current date.

- Select a *Category* if required (see below for setting these up).
- Use either the **New line** button to manually add a single item, or **Add from master list** to add all items from a master list.



When you click on the **Add from master list** button you will see a list of all the master lists assigned to your store and your customer (see the 4.04. Item master lists page for details on master lists and how to assign them). Whichever master lists you choose to add items from, only the items visible in your *customer's* store will be added to the requisition. This will avoid the situation where you send a store an item that they didn't previously have visible to them!

- If the customer is another store, mSupply already knows their current stock, otherwise adding a single item will give you the opportunity to enter the customer's current stock for that item. Either way, the cursor will go into the *Customer current stock on hand* cell, which will already be filled in.
- If adding from a master list, the cursor will go into the first new item's *Customer current stock* on hand cell, but you'll then have to type in a value (unless the customer is another store, in which case the value will have been filled in for you).
- Either way, hitting the **Tab** key will move the cursor into the *Customer requested* cell. Type in a value and this will be automatically copied to the *Remaining to supply* cell and also the *Supply this invoice* cell, which will now have the cursor.
- Amend the *Supply this invoice* value if necessary and optionally enter a *Comment* (e.g. if the amount supplied is less than requested).
- If necessary, use the **Delete line(s)** button to remove selected item lines.

If the requisition has come in automatically from another store (e.g. mobile or an internal order):

- The customer *Name* is already filled in and cannot be changed.
- The *Customer current stock on hand* and *Customer requested* columns are already filled in and cannot be changed i.e. only the *Supply this invoice* and *Comment* columns are editable.
- If necessary, you can still add and/or delete item lines manually.

If the requisition has a lot of item lines, you can filter them by typing into the *Filter items* field. If you do that, only the lines with items beginning with the letters you have typed in the field will be displayed. The text X/Y will be displayed after the search field to indicate that X lines of the total Y lines in the requisition are currently being displayed (2/8 in the following screenshot):

Requisition d	me Cactus Hospital	CAC		Their	ref 678 ent				Bi	ack	ID:2 Status:s Type:r	g
New line	Add from master list De	lete line(s) Filter ite	ms 🛛		2/8			Cri	eate customer invoice	Print	Entry date : 1 Entered by : A	5/02/18
Li Item co		ue Unit	Our stock on hand	Customer current stock on hand	Customer requested	Already issued	Remaining to supply	Supply this invoice		Comment		
1 030453	Amoxicillin 250mg tabs		2,257,600	265	200	0			partial supply			0
5 030062	Acetylsalicylic Acid 300	ng tabs Tabl	5,000	761	400	0	400	300	partial supply			

Note that, while a filter is active, some of the other buttons are disabled e.g. you can't create an invoice or save the sort order unless all lines are visible. To make them active again, simply delete any text in the *Filter items* textbox (which will remove the filter).

Once you are satisfied, the *Create customer invoice* button should be clicked, and you will proceed to creating the customer invoice. The *Supply this invoice* values will be used to populate the new customer invoice and the requisition status will change to confirmed.

Finalise Checkbox

Clicking on the "Finalise Checkbox" finalises the requisition form. After this no changes can be made.

Finalised requisitions will no longer appear on reports that show "Remaining Quantities" as pending. Finalised requisitions are be considered as fully processed.

Requisition categories

You can assign requisitions to a category for reporting. To setup the categories that users can select from, choose *Special* > *Requisition categories* from the menus. This window will open:

+		The barries and
New	Set inactive	Type here to search
	Description	Is active?
Normal		
Emergency		

This window shows a list of all the requisition categories currently setup. The ones with a tick in the *Is active* column are the ones that can be selected on a requisition. If there is a long list then you can type in the *Type here to search* field to show only categories that contain what you type.

To add a new category, click on the **New** button. This window opens:

• • •	Requisition category	
Description		
Is active		
	Cancel OK	

Enter a **Description**, click the **OK** button and the new category is added to the list.

To edit a category, double-click on it in the list and the same window as creating a new one will open but populated with the selected category's settings. Edit the name or the Active status and click the **OK** button to save your changes.

You can quickly set a category as inactive (which means that it will no longer appear in the drop down list for selection on a requisition) by selecting it in the list and clicking on the **Set as inactive** button.

Requisition status

Summarising from above, the status of the requisition has the following meanings:

- Status = sg (suggested): No customer invoices have been created yet
- Status = cn (confirmed): At least one customer invoice has been created from the requisition
- Status = fn (finalised): No changes can be made to the requisition. It will no longer appear on reports that show "Remaining Quantities" as pending. Finalised requisitions are be considered as fully processed.

Creating the customer invoice

Regardless of the requisition type, when the *Create customer invoice* button has been clicked, and the following window appears:

c	Thei	ir ref	HC4		nfirm date Category	None		-	Colour: Invoice: 30,034 Entry date: 26/08/1 Goods receive ID: 0 Status: sg		
Ne	w lir		Delete line(s) by Item Summary by Batch Transport deta	ails Log		History		Confirm	Entered by: Sussol Store: General		
N	Li	Location	Item Name	Quan	Pack Size	Batch	Exp date	Sell Price	Price exten		
Ľ	1		Ibuprofen 200mg tab	1500	1	none		0.00		0.00	^
Ľ	2		Prednisolone 5mg tab	1000	1	none		0.00		0.00	
	3		Haloperidol 5mg tab	100		none		0.00		0.00	
E.	:	I 🚺 🖬	Other cha	rges Item:					Amount:	0	.00
	-		,						Subtotal:	-	.00
									0 % tax:		.00
Ho	ld								Total:	0	.00

If the customer invoice has been generated from an original internal order in another store, the customer invoice window will have a red **Stock transfer** label.

Similarly, if the customer invoice has been generated from an original internal requisition in another store, the customer invoice window will have a red **Internal requisition** label.

All the entries appear as (red) placeholder lines. The operator needs to allocate stock to each of these

placeholder lines before a pick list can be printed. The operator can either manually allocate stock or by using the Grinder button.

Manually allocate stock

The next step is to double click on each entry and allocate stock. In the example, the 1st item on the invoice, *Ibuprofen 200mg tablets*, is being processed; there are several batches in our store, some of which have reached their expiry; although line 4 indicates there are sufficient to meet this order in the store, you will note that only 106 tablets are available, so we select line 6.

Iten	Ibupro	ofen 200m	g tab						🤳 Ibu	2			
Line	•	6											
Quar	15	00 of 25	00										
Pac	c 📃	1 each	В	ulk/Out	ter pa	ick size	0						
Add Place holder Re-lookup Sell Price]					
Li	Issue	Available	Tot in store	Pack	Hold	Batch	Expdate	Supplier	Location	Cost Price	Sell price	Status	
2	0	600	600	1		ID1H0280	30/11/10	ida	TAB	0.01	0.01		
3	0	140	140	1		IDIH0280	30/11/10	ida	TAB	0.01	0.01		
4	0	106.0000	1596	1		IDIH0280	29/11/16	ida	TAB	0.01	0.01		
5	0	1000	1000	1		G366	31/12/16	invad	AAA	0.00	0.00		
6	0	2500	4000	1		DP8081	31/01/17	ida	AAA	0.01	0.01		

Clicking on OK & Next displays the next item on the invoice, Prednisolone 5mg tablets.

dit line	_	_										-	_
Item	Predni	solone 5m	ig tab						📕 Pre	d5			
Line		1											
Quar	10	00 of 0											
Pack		1 each	в	ulk/Out	ter pa	ck size	0						
	Add P	lace hold	er F	Re-distri	ibute	all	Re-lookup	Sell Price]				
Li	Issue	Available	Tot in store	Pack	Hold	Batch	Expdate	Supplier	Location	Cost Price	Sell price	Status	
1	1000	0	0	1		none				0.00	0.00		~
2	0	540	540	1		WE201	31/12/16	invad	AAA	0.00	0.00		
													Ŧ
													F
т		uantity iss ntity avail		1000 540				Ca	ncel	ОК		K & Next	ו

Click *Redistribute all*, which is the normal procedure. There is only one batch available, but there is insufficient stock to meet the order, so mSupply® creates a placeholder line for the outstanding

amount.

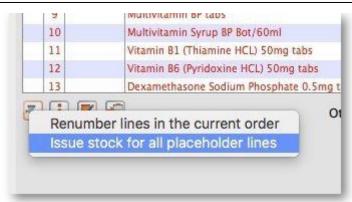


When the final item has been processed, clicking on OK will display the completed invoice.

	heir mm		HC4]	Category	None		¥	Invoice : 30,034 Entry date : 26/08/13 Goods receive ID : 0		
New	line		Delete line(s) by Item Summary by Batch Transport d	etails Log		Mistory	(E onfirm	Status : sg Entered by : Susso Store : Gener		
N Li	i	Location	Item Name	Quan	Pack Size	Batch	Exp date	Sell Price	Price exten		
1	1		Ibuprofen 200mg tab	1500	1	none		0.00		0.00	1
U,	2		Prednisolone 5mg tab	460	1	none		0.00		0.00	
9	2 A	AA	Ibuprofen 200mg tab	1500	1	DP8081	31/01/17	0.01		15.00	
2	3 A	AA.	Prednisolone 5mg tab	540	1	WE201	31/12/16	0.00		0.00	
:	3 T	(AB	Haloperidol 5mg tab	100	1	7MK29	31/10/10	0.06		6.00	
	1										
	т										
											Ι.,
			Other o	harges Item:					Amount:	0	0.0
	1	F 13	j						Subtotal:	21	.0
									0 % tax:	0	0.0
									Total:	21	.0
Hold			Export batch: 0				OK &		Delete OK		

The Grinder button

If your store is organised well, particularly by use of location priorities, you can automatically allocate stock to all placeholder lines by use of the grinder icon at the bottom left.



Make sure the Hold checkbox is not checked, and at this stage the invoice may be confirmed.

If the customer invoice is for another store (i.e. if it has a red **Stock transfer** label or red **Internal requisition** label), it must be **finalised** in order to transfer the goods to the other store:

- For a stock transfer, this will generate a supplier invoice in the other store see Transferring goods to another store
- For an internal requisition, this will generate a goods received record in the other store see Receiving goods from another store

After creating a customer invoice

- The *Already issued* column will be updated to reflect any non-placeholder lines (i.e. those not coloured red in the customer invoice) in any customer invoices which have been generated from the requisition regardless of the customer invoice status (i.e. it doesn't have to be confirmed).
- The *Remaining to supply* column will be reduced by the amount already issued, and *Supply this invoice* will be updated accordingly:

		Cactus Hospital	CAC		Their	ref 678				BI	ack	ID: 2
On (Ne		15.02/18	Filter items [Filter by item name or code]								Status: cn Type: response Entry date: 15/02/18 Entered by: Admin Store: Central Media	
	Item code	Item name	Unit	Our stock on hand	Customer current stock on hand	Customer requested	Already issued	Remaining to supply	Supply this invoice		Comment	
1	030453	Amoxicillin 250mg tabs	Tab	2,257,600	265	200	150	50	50	partial supply		^
2	038423	Salbutamol scored 2mg tabs	Tab	17,000	469	300	300	0	0			
3	042744	Diazepam Injection Smg/ml Amp/2ml	Am	1,450	5	30	30	0	0			
	850804	Oral Rehydration Solution Reso Ma	Sac	15,000	79	100	100	0	0			
5	030062	Acetylsalicylic Acid 300mg tabs	Tabi	5,000	761	400	300	100	100	partial supply		
	201116	Bandage W.O.W. 15cm wide x 5m roll	Roll	4,332		200	200	0	0			
7	031661	Captopril scored 25mg tabs	Tabl	47,500	77	200	200	0	0			
8	037020	Paracetamol 500mg tabs	Tabl	81,000	980	500	500	0	0			
¢												>

In the example above, a single customer invoice has been created to supply most of the requested stock, apart from two items. You can then create a second customer invoice to supply the outstanding amounts.

Details of the related customer invoices can be seen in the **Invoices created** tab:

Narr Requisition da	te 15/02/18	ospital		CAC Their ref 678				Black	ID: 2 Status: cn
Order Receive		Log							Type : response Entry date : 15/02/18 Entered by : Admin Store: Central Med
Invoice	Invoice confirmed	Invoice status	ltem code	Item Name	Number of packs	Pack Size	Total quantity	Batch	Expiry date
27	06/06/2018	cn	030062	Acetylsalicylic Acid 300mg tabs	0	1,000	300	c17878	30/04/2020
28		sg	030062	Acetylsalicylic Acid 300mg tabs	0	1,000	100	c17878	30/04/2020
27	06/06/2018	cn	030453	Amoxicillin 250mg tabs	0	1,000	150	82929	31/12/2020
28		sg	030453	Amoxicillin 250mg tabs	0	1,000	50	82929	31/12/2020
27	06/06/2018	cn	201116	Bandage W.O.W. 15cm wide x 5m roll	3	12	36		
27	06/06/2018	cn	201116	Bandage W.O.W. 15cm wide x 5m roll	13	12	164	D456486	30/04/2021
27	06/06/2018	cn	031661	Captopril scored 25mg tabs	0	500	200	CI67562	30/07/2022
27	06/06/2018	cn	042744	Diazepam Injection 5mg/ml Amp/2ml	1	25	30	sdflj28	31/03/2020
27	06/06/2018	cn	850804	Oral Rehydration Solution Reso Mal 42g sachet for 1 litre/ CAR-100	1	100	100	654TD47	
27	06/06/2018	cn	037020	Paracetamol 500mg tabs	0	1,000	500	D56756	
27	06/06/2018	cn	038423	Salbutamol scored 2mg tabs	0	1,000	300	56D7678	31/03/2022

Double-clicking on any of these lines will open the corresponding customer invoice.

Danger of failing to re-supply in time

Obviously, regardless of the calculation method employed, if the supplying store fails to re-supply the customer within the supply period (G) then the customer will start eating into the buffer stock and is in danger or running out of stock!

Previous: 8.06. Box management | | Next: 8.08. Customer budgets

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Last update: 2022/09/05 14:00

